

MIDWEST AREA
STANDARD OPERATING PROCEDURES
MANUAL

**FILES, RETENTION &
DISPOSITION**

Created by:
Program Administrative Support Task Group
Updated July 2003

FILES, RETENTION AND DISPOSITION

BUDGET -- Current plus 5 years (in case of 5-year review).

ANNUAL REPORTS AND PLANS -- Current plus 5 years (in case of 5-year review).

STATUS OF FUNDS -- Current plus 2 years.

PURCHASE ORDERS -- Current plus 2 years.

PATENT INFORMATION -- Current plus 5 years

T&As, Hard Copy -- Current plus 6 years if you retain originals. (This should include backup documentation; e.g., leave slips).

T&As, Backup Disk Copy -- 26 Pay Periods

TRAVEL (DOMESTIC) -- Current plus 6 years and 3 months.

TRAVEL (FOREIGN) -- Current plus 6 years and 3 months.

TRAVEL AUTHORIZATIONS -- Current plus 6 years and 3 months.

TRAVEL VOUCHERS -- Current plus 6 years and 3 months.

TRAINING FORMS -- Current plus 3 years

CORRESPONDENCE -- Current plus 5 years

115's -- Current plus three years (provided they've been published)

425's -- Current plus five years (funded or unfunded)

PCMS Documentation -- Purchase Under \$2500-Current plus three years.

PCMS Documentation -- Purchase Over \$2500-Current plus six years.

Throw nothing away on program agreements, projects (active or inactive), etc.